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ABSTRACT

Monitoring is an ongoing and systematic activity which provides school districts, private schools, private Early Childhood Services operators, and Alberta Education with information needed to determine whether policies and programs are being implemented as planned, are meeting basic Provincial requirements, and what improvements are needed. Monitoring allows for descriptions and reviews of (1) programs implemented in local jurisdictions, (2) local policy positions, (3) participation rates, and (4) the opinions of superintendents, administrators, teachers, parents, and students. This document, designed to assist Regional Offices of Education in the monitoring of educational programs, contains (1) general information about monitoring; (2) an outline of policies, guidelines, and procedures for monitoring; (3) an overview of the monitoring responsibilities of the Regional Offices of Education; and (4) monitoring forms for the following Special Needs programs: Early Childhood Services, Educational Opportunities, Official and Other Languages, English as a Second Language, School Extension, Special Education Teacher Inservice, and Vocational Education. The handbook concludes with a summary form for observations, general assessment, and recommendations. (IW)

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POLICY/PROGRAM MONITORING HANDBOOK

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Alberta Education

Alberta

POLICY/PROGRAM MONITORING HANDBOOK

Alberta Education
September, 1986

FOREWORD

This revised Policy/Program Monitoring Handbook has been prepared by Alberta Education to assist Regional Offices of Education in the monitoring of educational programs. The monitoring instruments and criteria have been refined based on the monitoring conducted by Alberta Education during the 1985/86 school year. The mandatory criteria in these instruments are requirements of Alberta Education and must be adhered to by school jurisdictions, private schools and private Early Childhood Services operators to qualify for Provincial funding. Regional Offices of Education will be using the monitoring instruments in this Monitoring Handbook to conduct monitoring for the 1986/87 school year.

The monitoring of educational programs is a responsibility of Alberta Education and school jurisdictions, private schools, and private Early Childhood Services operators and helps to ensure accountability for policies and programs.

The instruments in this Handbook pertain to Special Needs Programs. Additional monitoring instruments will be added to the Handbook to assist Regional Offices of Education with their overall monitoring responsibilities for 1986/87.

POLICY PROGRAM MONITORING HANDBOOK

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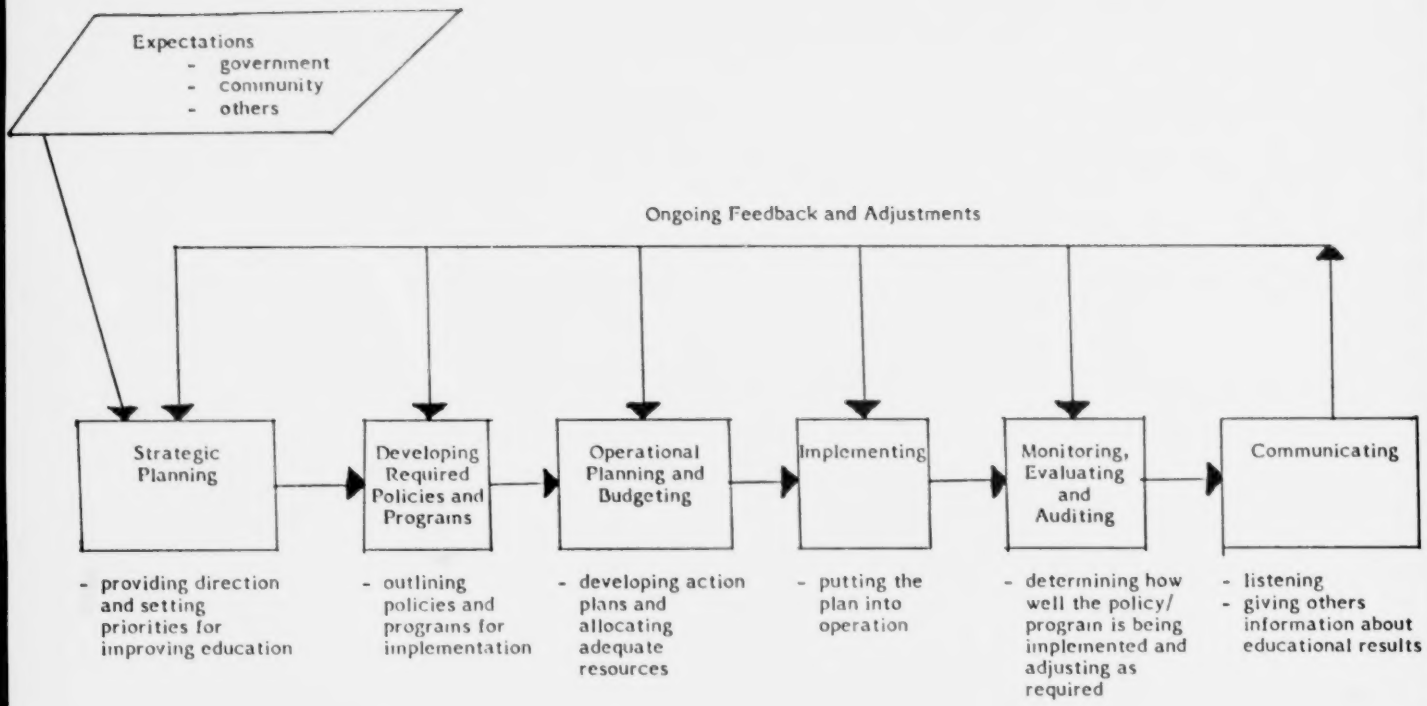
Expectations
- government
- community
- others
Ongoing Feedback and Adjustments
Strategic Planning
Developing Required Policies and Programs
Operational Planning and Budgeting
Implementing
Monitoring, Evaluating and Auditing
Communicating
- providing direction and setting priorities for improving education
- outlining policies and programs for implementation
- developing action plans and allocating adequate resources
- putting the plan into operation
- determining how well the policy/ program is being implemented and adjusting as required
- listening
- giving others information about educational results

FIGURE 1: The Management of Education Process

INTRODUCTION

A. Background

The Management and Finance Plan, introduced by Alberta Education in 1984, emphasizes a policy-based and results oriented approach to the management of education. The key components of the management system underlying the Management and Finance Plan are:

1. strategic planning
2. policy and program development
3. operational planning and budgeting
4. implementing
5. monitoring and adjusting
6. evaluating and adjusting
7. auditing and adjusting
8. communicating results

Each component is essential to the overall effectiveness of the system. The monitoring of educational programs is one key to an efficient and effective process for managing education. Figure 1 on page ii illustrates the management approach used and the placement of the monitoring function in the system.

B. Purposes

Alberta Education has prepared this Policy/Program Monitoring Handbook to assist Regional Offices of Education in the monitoring of educational programs. This document:

1. provides general information about monitoring;

2. outlines policies, guidelines, and procedures for monitoring;

3. provides an overview of the monitoring responsibilities of the Regional Offices of Education;

4. includes monitoring forms for Special Needs Programs; and

5. includes general forms used for program identification, and summary information.

C. Definition and Uses of Monitoring

Monitoring is an on-going and systematic activity which provides school jurisdictions, private schools, private Early Childhood Services operators, and Alberta Education with information needed to determine whether policies and programs are being implemented as planned, are meeting basic Provincial requirements, and what improvements are needed.

Monitoring allows for a description and review of programs implemented in local jurisdictions; of local policy positions; and of other aspects of the programs such as participation rates; the opinions of superintendents, administrators, teachers, parents, and students.

The following summarizes some of the uses of monitoring:

1. indicates whether a program is being implemented in accordance with the mandatory requirements of Alberta Education and local policy positions;

2. permits comparisons of the extent to which program implementation is congruent with program design;

3. provides one basis for the adjustment of programs and program activities, which may include changes in the design, or improved implementation;

4. provides one basis for the refining of policy at both Provincial and local levels;

5. indicates whether a full-scale evaluation of a program, or set of programs, is necessary;

6. provides one source of information upon which Grant Application Form approval and funding levels may be decided;

7. provides an information and data base to identify trends in program implementation and design;

8. allows other key Regional Office functions to be carried out, such as, providing consultative services;

9. provides a reading on system/school plans and initiatives;

10. encourages jurisdictions to examine programs to see what improvements are needed; and

11. helps to identify inservice needs for systems/schools.

I POLICY, GUIDELINES AND PROCEDURES FOR MONITORING

Policy

Alberta Education will systematically monitor educational programs to determine if local policies comply with Provincial policies and are consistent with Provincial guidelines and procedures. Monitoring will also determine if program plans are being implemented in accordance with Provincial requirements and local policies.

Guidelines

1. Alberta Education has established two categories of monitoring information important to the successful implementation of an educational program:

   (a) **Mandatory criteria** are program characteristics which must be adhered to by the grant applicant/recipient because they are requirements. The criteria are outlined in Alberta Education's policy documents such as the Program Policy Manual, Programs of Studies, Early Childhood Services Philosophy, Goals and Program Dimensions, the School Grants Manual, and the Junior-Senior High School Handbook.

   (b) **Discretionary items** are recommended program characteristics which enhance the quality of educational programs for students. The grant applicant /recipient is encouraged to utilize these discretionary items as guidelines for developing, implementing, and improving educational programs.

   (c) Regional Offices of Education must communicate the distinction between Alberta Education's mandatory criteria and discretionary items to school jurisdictions, private schools and private Early Childhood Services operators.

2. (a) Alberta Education's first priority will be to determine if its mandatory criteria are being met.

   (b) Alberta Education's second priority will be to gather information on the discretionary items and to use the findings when providing consultation and feedback to local jurisdictions about making program improvements.

3. Alberta Education's monitoring will be based on a process of systematic sampling, as appropriate.

4. Monitoring information is gathered by Regional Offices of Education primarily for Alberta Education decision-making purposes, and may affect decisions on subsequent grant application submissions by school boards, private schools and private Early Childhood Services operators.

5. Alberta Education's monitoring information is also made available to jurisdictions, as appropriate, to assist in local decision-making.

6. Alberta Education will determine priorities for monitoring on an annual basis and will develop appropriate instrumentation to conduct its monitoring.

7. School jurisdictions have the responsibility and authority to determine local monitoring priorities.

8. The implementation of Alberta Education's monitoring system is the responsibility of the Regional Offices of Education.

9. Professional judgements by Regional Office monitors will be required in order to assess program compliance with the requirements of Alberta Education, and to make recommendations for follow-up actions by Alberta Education and/or by school jurisdictions, private schools, and private Early Childhood Services operators, to ensure program compliance.

10. The Deputy Minister and Assistant Deputy Ministers are responsible for making decisions about any modifications to Alberta Education's policies and programs based on feedback and recommendations from monitoring.

Procedures

1. Provincial monitoring priorities for the following school year will be finalized by Education Officials in time to be accommodated in Regional Office monitoring plans and schedules, but not later than June. Priorities will include consideration of Alberta Education concerns, issues raised by external stakeholders, and requests by school boards, private schools, and private Early Childhood Services operators to monitor certain programs or aspects of programs.

2. Regional Offices will develop program monitoring plans which will reflect Provincial and regional monitoring priorities. Monitoring may be conducted provincially or regionally, on the basis of 100% or random sampling of the total program offering.

3. Regional Offices will inform school jurisdictions, private schools, and private Early Childhood Services operators about Alberta Education's monitoring priorities and plans.

4. Recommendations as a result of monitoring will be made available to local jurisdiction personnel responsible for the program, and will be documented in writing where appropriate.

5. Regional Offices will submit a zone monitoring report to the Assistant Deputy Minister, Program Delivery.

6. Planning and Evaluation Division will prepare a Provincial monitoring report based on an analysis and synthesis of zone monitoring reports.

7. The results of monitoring as outlined in the Provincial monitoring report will be considered in strategic planning and budgeting for the following year, and will be one basis for Alberta Education's setting evaluation priorities.

II OVERVIEW OF MONITORING RESPONSIBILITIES OF THE REGIONAL OFFICES OF EDUCATION

The following policies or programs have been identified as areas that the Regional Offices of Education will monitor:

Foundation Programs

- Elementary/Junior High Computer Project
- Business Education Equipment Upgrading Project
- School Libraries
- Home Schooling

Special Programs

Special Needs Programs

- Early Childhood Services
  Instructional Grant; Teacher Inservice; Language Programs Other than French or English; Language Program, French
- Educational Opportunities Fund
  Compensatory; Elementary
- Official and Other Languages
  French Language Programs; Languages Other than English or French; English as a Second Language
- Regional Film Centres
- School Extension Programs
  Adult Basic; Regular/Day/Evening/Summer; Special Education
- Special Education Programs
  Educationally Disabled; Gifted and Talented; Institutional Support; Sensory Multi-handicapped
- Teacher Inservice
- Vocational-Education Programs
  Academic-Occupational; Vocational Education; Off-Campus Vocational Education

Alberta Education Projects

- Initiation to Teaching

Provincial Evaluation Policies

- Student Evaluation
- Teacher Evaluation
- Program, School, and System Evaluation

Curriculum Implementation

- Elementary Computer Literacy
- Junior High Computer Literacy
- Senior High Computer Literacy

Private Schools

Pupil Count

- School Foundation Program Fund Count
- Resident Pupil Count

Provincial Monitoring Priorities

The Provincial Monitoring Priorities for 1986/87 approved by Education Officials are:

- Special Education (Special Needs Program Areas)
- BQRP (Business Education Equipment Upgrading Project)
- Secondary Education Implementation (Retroactive Credits, Complementary Courses, Time Allottments in Junior High)
- Initiation to Teaching
- Libraries

III SPECIAL NEEDS PROGRAM MONITORING INSTRUCTIONS AND FORMS

The forms to be used by Regional Offices to monitor a Special Needs Program will consist of the appropriate forms for the program area plus the General Identification Form and Summary Form.

Each of the Special Needs Program Monitoring Forms are two-page instruments which appear on Pages III-3 to III-25 of the Handbook.

The General Identification Form is on Page III-2 and the Summary Form is a three-page instrument which appears on Page III-26.

GENERAL IDENTIFICATION INFORMATION FOR MONITORING FORMS

Program Monitored: _____ **Zone:** _____

Type of Operator:

_____ School Board (Public School)

_____ School Board (Separate School)

_____ Public Early Childhood Services Operator

_____ Private Early Childhood Services Operator

_____ Private School

School Board/Society: _____

Address: _____ **Postal Code:** _____

Persons Contacted in Jurisdiction:

Name	Title	Phone
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Schools/ECS Centres Visited: _____

_____

_____

ROE Monitor: _____

Date(s) of Visits: _____

_____

_____

Other: _____

Date Form Completed: _____

September, 1986

ACADEMIC OCCUPATIONAL Code: 1 = Yes 3 = Under Development
MONITORING FORM: 2 = Requires Adjustment 4 = No

MANDATORY CRITERIA		COMMENTS
1.	The school board has developed written policies, guidelines, and procedures which	
	a) are in keeping with the intent of Alberta Education policies, 1 2 3 4	
	b) are implemented, 1 2 3 4	
	c) are maintained, reviewed and updated to reflect current local or Alberta Education policies. 1 2 3 4	
2.	Programs are monitored by the school jurisdiction as required by its policies. 1 2 3 4	
3.	The instructional program follows Alberta Education requirements:	
	a) Year 1: Basic 625-750 hours 1 2 3 4	
	Occupational 250-375 hours 1 2 3 4	
	b) Years 2,3,4: Basic 475-600 hours 1 2 3 4	
	Occupational 400-525 hours 1 2 3 4	
4.	The school board has developed and implemented procedures for student referral, screening, program development, program entry and exit, and student placement involving the sending and receiving schools. 1 2 3 4	
5.	Students meet the criteria for entrance into the program. 1 2 3 4	
6.	The A/O program is identifiable as a three or four year program. 1 2 3 4	
7.	Years 2, 3 and 4 are offered in an approved vocational school facility or authorized equivalent. 1 2 3 4	
8.	Career counselling is an integral part of the program. 1 2 3 4	
9.	Differential services are provided to help students develop competencies in essential learnings and career occupational skills. 1 2 3 4	
10.	The occupational component is composed of practical laboratory/shop courses only (such as building maintenance, service station operation and management). 1 2 3 4	
11.	Parents, guardians, and students are informed of the nature and expectations of the program. 1 2 3 4	
12.	The program provides multiple entry and exit points for students to cross over from the regular to the A-O program or vice versa. 1 2 3 4	

ACADEMIC OCCUPATIONAL MONITORING FORM: Code: 1 = Yes; 3 = Under Development; 4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

			COMMENTS
1.	Services are coordinated with agencies such as Social Services and Alberta Manpower and with local business and industry.	1 3 4	
2.	Work Experience 15, 25 series of courses are incorporated into Year 2 and subsequent years of the program.	1 3 4	
3.	Class sizes in basic subjects do not exceed 20 students.	1 3 4	
4.	Class sizes in occupational courses do not exceed 15 students.	1 3 4	
5.	The school board uses Provincial and local monitoring to make adjustments to improve the program.	1 3 4	
6.	Documentation of the results of monitoring conducted by the school jurisdiction is maintained on file.	1 3 4	
7.	A plan exists for the effective management of the program including staff responsible and coordination procedures.	1 3 4	
8.	Regular inservice opportunities are available to all staff to meet identified needs.	1 3 4	

OTHER/GENERAL COMMENTS

VOCATIONAL EDUCATION MONITORING FORM - Regular Program

Code: 1 = Yes; 2 = Requires Adjustment; 3 = Under Development; 4 = No

MANDATORY CRITERIA		COMMENTS
1. The school board has developed written policies, guidelines, and procedures which		
a) are in keeping with the intent of Alberta Education policies,	1 2 3 4	
b) are implemented,	1 2 3 4	
c) are maintained, reviewed and updated to reflect current local or Alberta Education policies.	1 2 3 4	
2. Programs are monitored by the school jurisdiction as required by its policies.	1 2 3 4	
3. Students have access to a full 12-22-32 or 15-25-35 series of courses.	1 2 3 4	
4. All courses are taught by certificated teachers who hold valid Alberta journeyman or equivalent status in the trade or technology courses taught.	1 2 3 4	
5. All facilities used to offer the program are approved by Alberta Education.	1 2 3 4	

VOCATIONAL EDUCATION MONITORING FORM - Regular Program

Code: 1 = Yes 3 = Under Development 4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

		COMMENTS
1.	The school board uses Provincial and local monitoring to make adjustments to improve the program. 1 3 4	
2.	Documentation of the results of monitoring conducted by the school jurisdiction is maintained on file. 1 3 4	
3.	A plan exists for the effective management of the program including staff responsible and coordination procedures. 1 3 4	
4.	Regular inservice opportunities are available to all staff to meet identified needs. 1 3 4	

OTHER/GENERAL COMMENTS

VOCATIONAL EDUCATION MONITORING FORM - Off-Campus Program

Code: 1 = Yes; 2 = Requires Adjustment; 3 = Under Development; 4 = No

MANDATORY CRITERIA		COMMENTS
1.	The school board has developed written policies, guidelines, and procedures which	
	a) are in keeping with the intent of Alberta Education policies, 1 2 3 4	
	b) are implemented, 1 2 3 4	
	c) are maintained, reviewed and updated to reflect current local or Alberta Education policies. 1 2 3 4	
2.	Programs are monitored by the school jurisdiction as required by its policies. 1 2 3 4	
3.	Students have access to a full 12-22-32 or 15-25-35 series of courses. 1 2 3 4	
4.	All worksite facilities used to offer the program are approved by Alberta Education. 1 2 3 4	
5.	All courses are supervised by certificated teachers who carry out the required supervisory responsibilities. 1 2 3 4	
6.	All on-site instructors hold a valid Alberta journeyman or equivalent status in the trade or technology courses taught. 1 2 3 4	
7.	The students' right of access to credits is protected if an off-campus program is terminated. 1 2 3 4	
8.	An alternative delivery system is available for at least partial credit if the contract with the worksite is not carried out or renewed. 1 2 3 4	
9.	The on-site instructor has primary responsibility for students while they are at the worksite. 1 2 3 4	
10.	The worksite has adequate space provisions for the number of students enrolled. 1 2 3 4	
11.	The facilities and equipment at the worksite are adequate to achieve the objectives of the program. 1 2 3 4	
12.	A plan exists for the program to be evaluated by the school board and a report submitted to the Director of the Regional Office. 1 2 3 4	

VOCATIONAL EDUCATION MONITORING FORM - Off-Campus Program

Code: 1 = Yes 3 = Under Development 4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

		COMMENTS
1.	Parents, guardians, and students are informed of the nature and expectations of the program, its goals and its progress.	1 3 4
2.	Community resources, physical and human, are used in the program.	1 3 4
3.	The school board uses Provincial and local monitoring to make adjustments to improve the program.	1 3 4
4.	Documentation of the results of monitoring conducted by the school jurisdiction is maintained on file.	1 3 4
5.	A plan exists for the effective management of the program including staff responsible and coordination procedures.	1 3 4
6.	Regular inservice opportunities are available to all staff to meet identified needs.	1 3 4

OTHER/GENERAL COMMENTS

EARLY CHILDHOOD SERVICES MONITORING FORM

Code: 1 = Yes 2 = Requires Adjustment 3 = Under Development 4 = No

MANDATORY CRITERIA		COMMENTS
1. The school board or program operator has developed written policies, guidelines, and procedures which		
a) are in keeping with the intent of Alberta Education policies,	1 2 3 4	
b) are implemented,	1 2 3 4	
c) are maintained, reviewed and updated to reflect current local or Alberta Education policies.	1 2 3 4	
2. Programs are monitored by the school jurisdiction or the ECS program operator as required by their policies.	1 2 3 4	
3. Enrolment information is maintained on file for:		
a) severely disabled children (PUG)	1 2 3 4	
b) mildly/moderately disabled children	1 2 3 4	
c) regular needs children, including developmentally immature. *Cross-reference with Enrolment Form #ED20.02.	1 2 3 4	
4. An Individual Program Plan (IPP) is in place for each severely disabled child (funded through PUG).	1 2 3 4	
5. Teachers have a valid Alberta Teacher Certificate and an ECS diploma or interim ECS permit. *Cross-reference with Computer Form #EDJSS040.	1 2 3 4	
6. The program is consistent with, and planned, implemented and evaluated on the basis of the beliefs and principles in Early Childhood Services Philosophy, Goals and Program Dimensions (1984).	1 2 3 4	
7. Copies of current health and fire reports are maintained on file for programs offered in other than an approved school facility.	1 2 3 4	
8. Children meet the criteria for entrance into the program.	1 2 3 4	

EARLY CHILDHOOD SERVICES MONITORING FORM

Code: 1 = Yes 3 = Under Development 4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

			COMMENTS
1.	The school board or program operator has developed and implemented procedures for child referral, screening, program development, and program entry and exit.	1 3 4	
2.	An Individual Program Plan is in place for each mildly or moderately disabled child.	1 3 4	
3.	Regular inservice opportunities are available to all staff to meet identified needs.	1 3 4	
4.	Advisory committees and/or administrative structures/mechanisms are in place to obtain input from parents.	1 3 4	
5.	Community resources, physical and human, are used in the program.	1 3 4	
6.	Parents and guardians are informed of the nature and expectations of the program, its goals and child progress.	1 3 4	
7.	Parents participate in program placement, planning, implementation, and evaluation.	1 3 4	
8.	The school board or program operator uses Provincial and local monitoring to make adjustments to improve the program.	1 3 4	
9.	Documentation of the results of monitoring conducted by the school jurisdiction or program operator is maintained on file.	1 3 4	
10.	A plan exists for the effective management of the program including staff responsible and coordination procedures.	1 3 4	

OTHER/GENERAL COMMENTS

EDUCATIONAL OPPORTUNITIES FUND ELEMENTARY COMPONENT MONITORING FORM:

Code: 1 = Yes 2 = Requires Adjustment 3 = Under Development 4 = No

MANDATORY CRITERIA		COMMENTS
1. The school board has developed written policies, guidelines, and procedures which		
a) are in keeping with the intent of Alberta Education policies,	1 2 3 4	
b) are implemented,	1 2 3 4	
c) are maintained, reviewed and updated to reflect current local or Alberta Education policies.	1 2 3 4	
2. A written description of the E.O.F. Elementary Program is kept on file and includes the program's rationale, target students, objectives, educational activities and evaluation procedures.	1 2 3 4	
3. The E.O.F. Elementary Program		
a) provides direct instructional services to students,	1 2 3 4	
b) is recognizably different from the regular school programs,	1 2 3 4	
c) provides an extension to the regular program.	1 2 3 4	
4. Programs are monitored by the school jurisdiction as required by its policies.	1 2 3 4	

EDUCATIONAL OPPORTUNITIES FUND ELEMENTARY COMPONENT MONITORING FORM:

Code: 1 = Yes 3 = Under Development 4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

		COMMENTS
1.	The school board employs specially qualified professional and support personnel to help achieve the objectives of the E.O.F. Elementary Program. 1 3 4	
2.	The school board provides appropriate learning materials and equipment to help achieve the objectives of the E.O.F. projects. 1 3 4	
3.	Community participation and parental involvement are features of the program. 1 3 4	
4.	Regular inservice opportunities are available to all staff to meet identified needs. 1 3 4	
5.	Parents, guardians, and students are informed of the nature and expectations of the program, its goals and its progress. 1 3 4	
6.	The school board uses Provincial and local monitoring to make adjustments to improve the program. 1 3 4	
7.	Documentation of the results of monitoring conducted by the school jurisdiction is maintained on file. 1 3 4	
8.	A plan exists for the effective management of the program including staff responsible and coordination procedures. 1 3 4	

OTHER/GENERAL COMMENTS

EDUCATIONAL OPPORTUNITIES FUND COMPENSATORY COMPONENT MONITORING FORM:

Code: 1 = Yes 2 = Requires Adjustment 3 = Under Development 4 = No

MANDATORY CRITERIA		COMMENTS
1. The school board has developed written policies, guidelines, and procedures which		
a) are in keeping with the intent of Alberta Education policies,	1 2 3 4	
b) are implemented,	1 2 3 4	
c) are maintained, reviewed and updated to reflect current local or Alberta Education policies.	1 2 3 4	
2. Programs are monitored by the school jurisdiction as required by its policies.	1 2 3 4	
3. The instructional program follows the proposal approved by Alberta Education.	1 2 3 4	
4. The E.O.F. Compensatory Program has the following features:		
a) provides direct instructional services to students,	1 2 3 4	
b) provides services on a priority basis to students most in need,	1 2 3 4	
c) is observably different from the regular school program,	1 2 3 4	
d) assists in reducing an age-grade discrepancy of more than one year.	1 2 3 4	
5. Students meet the criteria for entrance into the program.	1 2 3 4	
6. The school board maintains on file:		
a) project plans,	1 2 3 4	
b) evaluation data,	1 2 3 4	
c) supporting documentation for annual reporting of expenditures.	1 2 3 4	

EDUCATIONAL OPPORTUNITIES FUND COMPENSATORY COMPONENT MONITORING FORM:

Code: 1 = Yes 3 = Under Development 4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

		COMMENTS
1.	The school board employs specially qualified professional and support personnel to help achieve the objectives of the E.O.F. Compensatory Program. 1 3 4	
2.	The school board provides appropriate learning materials and equipment to help achieve the objectives of the approved E.O.F. program proposal. 1 3 4	
3.	Community participation and parental involvement are features of the program. 1 3 4	
4.	Regular inservice opportunities are available to all staff to meet identifed needs. 1 3 4	
5.	Parents, guardians, and students are informed of the nature and expectations of the program, its goals and its progress. 1 3 4	
6.	The school board uses Provincial and local monitoring to make adjustments to improve the program. 1 3 4	
7.	Documentation of the results of monitoring conducted by the school jurisdiction is maintained on file. 1 3 4	
8.	A plan exists for the effective management of the program including staff responsible and coordination procedures. 1 3 4	
9.	The school board has developed and implemented procedures for student referral, screening, program development, and program entry and exit. 1 3 4	

OTHER/GENERAL COMMENTS

FRENCH LANGUAGE EDUCATION AND LANGUAGES OTHER THAN FRENCH OR ENGLISH MONITORING FORM:

Code: 1 = Yes 2 = Requires Adjustment 3 = Under Development 4 = No

MANDATORY CRITERIA		COMMENTS
1. The school board has developed written policies, guidelines, and procedures which		
a) are in keeping with the intent of Alberta Education policies,	1 2 3 4	
b) are implemented,	1 2 3 4	
c) are maintained, reviewed and updated to reflect current local or Alberta Education policies.	1 2 3 4	
2. Programs are monitored by the school jurisdiction as required by its policies.	1 2 3 4	
3. The ECS Program is in agreement with the ECS program requirements of Alberta Education.	1 2 3 4	
4. The instructional program for Grades 1-12 follows Alberta Education's approved Program of Studies and uses instructional materials as prescribed or approved by the Minister.	1 2 3 4	
5. The instructional program includes cultural activities congruent with the program objectives.	1 2 3 4	
6. The instructional program in French Language Education provides for the following:		
a) not less than 5 hours per week of English Language Arts for grades 3, 4, 5, 6,	1 2 3 4	
b) not less than 150 hours per year of English Language Arts for grades 7, 8, 9,	1 2 3 4	
c) not less than 125 hours per year of English Language Arts for grades 10, 11, 12.	1 2 3 4	
7. Instruction in French Language Education is provided for at least 25% of the instructional day.	1 2 3 4	
8. Instruction in Languages other than English or French:		
a) is provided for at least 25% of the instructional day to a maximum of 50%,	1 2 3 4	
b) includes instruction in the specified language for at least one discipline in addition to language arts.	1 2 3 4	

FRENCH LANGUAGE EDUCATION AND LANGUAGES OTHER THAN FRENCH OR ENGLISH MONITORING FORM:

Code: 1 = Yes 3 = Under Development
4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

		COMMENTS
1.	The school board has determined the amount of instructional time in the language other than English for Grades 1 and 2. 1 3 4	
2.	The school board has determined the nature and extent of English language instruction in Grades 1 and 2 of the French Language Program. 1 3 4	
3.	The school board has determined the amount of instructional time in the language other than English for the ECS program. 1 3 4	
4.	Parents, guardians, and students are informed of the nature and expectations of the program, its goals and its progress. 1 3 4	
5.	Regular inservice opportunities are available to all staff to meet identified needs. 1 3 4	
6.	Advisory and/or administrative structures/mechanisms are in place to obtain input from community groups. 1 3 4	
7.	Community participation and parental involvement are built-in components of the program. 1 3 4	
8.	The program demonstrates advance planning of instruction (daily plans, unit and yearly plans). 1 3 4	
9.	The lesson and unit plans specify student objectives, content, teaching strategies, learning resources and assignments. 1 3 4	
10.	The program content reflects an understanding and appreciation of various cultures represented in the school/community. 1 3 4	
11.	The school board uses Provincial and local monitoring to make adjustments to improve the program. 1 3 4	
12.	Documentation of the results of monitoring conducted by the school jurisdiction is maintained on file. 1 3 4	
13.	A plan exists for the effective management of the program including staff responsible and coordination procedures. 1 3 4	

OTHER /GENERAL COMMENTS

September, 1986

ENGLISH AS A SECOND LANGUAGE MONITORING FORM:

Code: 1 = Yes 3 = Under Development
2 = Requires Adjustment 4 = No

MANDATORY CRITERIA		COMMENTS
1. The school board has developed written policies, guidelines, and procedures which		
a) are in keeping with the intent of Alberta Education policies,	1 2 3 4	
b) are implemented,	1 2 3 4	
c) are maintained, reviewed and updated to reflect current local or Alberta Education policies.	1 2 3 4	
2. Programs are monitored by the school jurisdiction as required by its policies.	1 2 3 4	
3. The instructional program for Grades 1-12 uses instructional materials as prescribed or approved by the Minister.	1 2 3 4	
4. The instructional program includes cultural activities congruent with the program objectives.	1 2 3 4	
5. The rapid integration of students into the school and community environment is encouraged as a priority.	1 2 3 4	
6. The school board maintains on file:		
a) a listing of the schools offering the program,	1 2 3 4	
b) a listing of teachers instructing the program,	1 2 3 4	
c) the number of minutes per week of instructional time,	1 2 3 4	
d) documentation to support the claim.	1 2 3 4	

ENGLISH AS A SECOND LANGUAGE MONITORING FORM:

Code: 1 = Yes 3 = Under Development
4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

		COMMENTS
1.	Parents, guardians, and students are informed of the nature and expectations of the program, its goals and its progress. 1 3 4	
2.	Regular inservice opportunities are available to all staff to meet identifed needs. 1 3 4	
3.	Community participation and parental involvement are built-in components of the program. 1 3 4	
4.	Advisory and/or administrative structures/mechanisms are in place to obtain input from community groups. 1 3 4	
5.	An administrative mechanism is in place to identify students eligible for funding. 1 3 4	
6.	The program demonstrates advance planning of instruction (daily plans, unit and yearly plans). 1 3 4	
7.	The lesson and unit plans specify student objectives, content, teaching strategies, learning resources and assignments. 1 3 4	
8.	The program content reflects an understanding and appreciation of various cultures represented in the school/community. 1 3 4	
9.	The school board uses Provincial and local monitoring to make adjustments to improve the program. 1 3 4	
10.	Documentation of the results of monitoring conducted by the school jurisdiction is maintained on file. 1 3 4	
11.	A plan exists for the effective management of the program including staff responsible and coordination procedures. 1 3 4	

OTHER/GENERAL COMMENTS

SCHOOL EXTENSION MONITORING FORM:

Code: 1 = Yes; 2 = Requires Adjustment; 3 = Under Development; 4 = No

MANDATORY CRITERIA		COMMENTS
1. The school board has developed written policies, guidelines, and procedures which		
a) are in keeping with the intent of Alberta Education policies,	1 2 3 4	
b) are implemented,	1 2 3 4	
c) are maintained, reviewed and updated to reflect current local or Alberta Education policies.	1 2 3 4	
2. Programs are monitored by the school jurisdiction as required by its policies.	1 2 3 4	
3. Records are maintained of grade level completion for Grades 1-9, or credits for Grades 10-12.	1 2 3 4	
4. All programs are taught by teachers certificated by Alberta Education.	1 2 3 4	
5. The instructional program follows Alberta Education's approved Program of Studies and uses instructional materials as prescribed or approved by the Minister.	1 2 3 4	
6. Students meet the criteria for entrance into the program.	1 2 3 4	
7. A Secondary School Program Plan has been forwarded to the appropriate Regional Office for each evening or summer extension program offered.	1 2 3 4	

SCHOOL EXTENSION MONITORING FORM: Code: 1 = Yes 3 = Under Development 4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

			COMMENTS
1.	The programs are adapted for adults as necessary.	1 3 4	
2.	A system of student recruitment is in place.	1 3 4	
3.	Students are provided with counselling and grade placement information.	1 3 4	
4.	Students have access to appropriate learning resources.	1 3 4	
5.	A policy of staff selection and recruitment is in place.	1 3 4	
6.	Teachers are considered an integral part of the professional staff.	1 3 4	
7.	Regular inservice opportunities are available to all staff to meet identified needs.	1 3 4	
8.	Students are informed of the nature and expectations of the program, its goals and its progress.	1 3 4	
9.	Community resources, physical and human, are used in the program.	1 3 4	
10.	The program involves appropriate interagency cooperation at the school/community level.	1 3 4	
11.	The school board uses Provincial and local monitoring to make adjustments to improve the program.	1 3 4	
12.	Documentation of the results of monitoring conducted by the school jurisdiction is maintained on file.	1 3 4	
13.	A plan exists for the effective management of the program including staff responsible and coordination procedures.	1 3 4	

OTHER/GENERAL COMMENTS

SPECIAL EDUCATION MONITORING FORM:

Code: 1 = Yes; 2 = Requires Adjustment; 3 = Under Development; 4 = No

MANDATORY CRITERIA		COMMENTS
1. The school board or program operator has developed written policies, guidelines, and procedures which		
a) are in keeping with the intent of Alberta Education policies,	1 2 3 4	
b) are implemented,	1 2 3 4	
c) are maintained, reviewed and updated to reflect current local or Alberta Education policies.	1 2 3 4	
2. Programs are monitored by the school jurisdiction or program operator as required by their policies.	1 2 3 4	
3. The school board has established a Special Education Placement Appeal Committee for ECS to Grade 12 through which parents or guardians may appeal placement decisions.	1 2 3 4	
4. Local policies, guidelines and procedures address the convening/conduct of the Special Education Placement Appeal Committee.	1 2 3 4	
5. The instructional program follows Alberta Education's approved Program of Studies and uses instructional materials as prescribed or approved by the Minister.	1 2 3 4	
6. Students meet the criteria for entrance into the program.	1 2 3 4	
7. Special transportation is provided for students unable to use regular transportation.	1 2 3 4	
8. Individual assessment, diagnostic, program development, consultative and/or therapy services are provided by qualified persons.	1 2 3 4	

SPECIAL EDUCATION MONITORING FORM: Code: 1 = Yes 3 = Under Development 4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

			COMMENTS
1.	Local policies, guidelines and procedures address:		
	a) integration of special needs students into regular classrooms,	1 3 4	
	b) the provision of special education in the French language,	1 3 4	
	c) the provision of services for children with special educational needs transferring from Early Childhood Services to Grade One.	1 3 4	
2.	The jurisdiction's special education policies are communicated to all professional staff.	1 3 4	
3.	The Special Education Placement Appeal Committee has convened regarding special education placements.	1 3 4	
4.	Class sizes are appropriate for the needs of the students.	1 3 4	
5.	Students in special education programs in segregated classes receive the same number of weekly instructional hours as students of the same age in regular classes.	1 3 4	
6.	The school board or program operator has developed and implemented procedures for student identification, assessment and placement.	1 3 4	
7.	Individual Program Plans are developed and implemented for each student.	1 3 4	
8.	Students are evaluated systematically using teacher-made, standardized, achievement, and/or diagnostic tests.	1 3 4	
9.	Support services such as psychologist, reading specialist, counsellor, speech pathologist are available and used when required.	1 3 4	
10.	School buildings and instructional areas are designed and equipped for students with physical disabilities.	1 3 4	

SPECIAL EDUCATION MONITORING FORM: Code: 1 = Yes 3 = Under Development 4 = No

DISCRETIONARY ITEMS continued **COMMENTS**

11. The program features:

    a) community participation, 1 3 4

    b) parental involvement in the special education placement and programming of their child. 1 3 4

12. Regular inservice opportunities are available to all staff to meet identified needs. 1 3 4

13. Parents, guardians, and students are informed of the nature and expectations of the program, its goals and its progress. 1 3 4

14. The school board or program operator uses Provincial and local monitoring to make adjustments to improve the program. 1 3 4

15. Documentation of the results of monitoring conducted by the school jurisdiction or program operator is maintained on file. 1 3 4

16. A plan exists for the effective management of the program including staff responsible and coordination procedures. 1 3 4

OTHER/GENERAL COMMENTS

TEACHER INSERVICE MONITORING FORM:

Code: 1 = Yes; 2 = Requires Adjustment; 3 = Under Development; 4 = No

MANDATORY CRITERIA		COMMENTS
1. The school board has developed written policies, guidelines, and procedures which		
a) are in keeping with the intent of Alberta Education policies,	1 2 3 4	
b) are implemented,	1 2 3 4	
c) are maintained, reviewed and updated to reflect current local or Alberta Education policies.	1 2 3 4	
2. Programs are monitored by the school jurisdiction as required by its policies.	1 2 3 4	
3. The priority for use of inservice funds is to improve the skills of groups of teachers.	1 2 3 4	
4. Inservice funds are used for individual teacher improvement only as a second priority.	1 2 3 4	
5. The school board has identified local priority areas for teacher inservice.	1 2 3 4	
6. Provincial inservice funds are <u>not</u> used for inservice activities associated with locally developed programs.	1 2 3 4	
7. Provincial inservice funds are <u>not</u> used to support sabbaticals, conference attendance by individual teachers, university credit courses, and salaries for the administration of the program.	1 2 3 4	

TEACHER INSERVICE MONITORING FORM: Code: 1 = Yes 3 = Under Development 4 = No

DISCRETIONARY ITEMS

Note: The following discretionary items are recommended program characteristics which enhance the quality of educational programs for students. Alberta Education policy documents identify such characteristics by use of the words "should" or "may". For monitoring purposes, discretionary items are used by Alberta Education as a guide for discussion/consultation with jurisdictions, private schools, and private Early Childhood Services operators about educational programs.

			COMMENTS
1.	Teachers or other stakeholders e.g. parents, school board members, Alberta Education staff are involved in planning, implementing, and monitoring teacher in-service activities.	1 3 4	
2.	Teacher inservice plans/activities focus on competencies that go beyond pre-service.	1 3 4	
3.	Teacher inservice programs emphasize classroom practice and provide solutions for teacher-identified problems.	1 3 4	
4.	Specialized needs and interests of groups of teachers and individual teachers are accommodated within the program.	1 3 4	
5.	The majority of teacher inservice programs incorporate:		
	a) long-term exposure to the identified skill(s),	1 3 4	
	b) opportunities to experience the skill(s).	1 3 4	
6.	Community resources, physical and human, are used in the program.	1 3 4	
7.	Inservice program information is readily available to teachers.	1 3 4	
8.	The school board uses Provincial and local monitoring to make adjustments to improve its program.	1 3 4	
9.	Documentation of the results of monitoring conducted by the school jurisdiction is maintained on file.	1 3 4	
10.	A plan exists for the effective management of the program including staff responsible and coordination procedures.	1 3 4	

OTHER/GENERAL COMMENTS

SUMMARY FORM: OBSERVATIONS, GENERAL ASSESSMENT, RECOMMENDATIONS

Code: 1 = Yes 3 = Under Development
2 = Requires Adjustment 4 = No

1. Policy and Program Compliance with Mandatory Criteria

1.1 The jurisdiction has a **program policy** in place.

1 2 3 4

COMMENTS

1.2 The **program policy** complies with Alberta Education's **mandatory** requirements.

1 2 3 4

COMMENTS

1.3 The **program** complies with **local policies.**

1 2 3 4

COMMENTS

SUMMARY FORM: OBSERVATIONS, GENERAL ASSESSMENT, RECOMMENDATIONS

Code: 1 = Yes 3 = Under Development 4 = No

2. **Program Consistency with Discretionary Items**

2.1. The program is consistent with Alberta Education's **discretionary items recommended for the program.**

1 3 4

COMMENTS

3. GENERAL ASSESSMENT OF PROGRAM
Note: Include consideration of mandatory criteria, discretionary items and other factors as appropriate.

3.1 Program strengths:

3.2 Areas requiring adjustment to comply with mandatory requirements:

3.3 Other areas in which improvement is recommended:

3.4 General assessment of program based on above summary observations:

4. **RECOMMENDATIONS**
Note: Include target dates as appropriate.

4.1 Regional Office of Education (monitoring, evaluation, other):

4.2 Jurisdiction:

4.3 Alberta Education (policy, program, other):

Date Form Completed: _____
ROE Monitor: _____

September, 1986